

# Evaluation Summary Report (BIE)

Last Modified on 12/14/2025 8:45 pm CST

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Tool Search: Special Ed Documents

Evaluations are used to document the student's educational needs and determine eligibility for special education. This document describes each editor, the section(s) of the print format that includes the entered information, a description of each field on the editor, and any special considerations and instructions for using the editor and fields.

**An evaluation must be created whether or not the student is determined to have a disability.** The school district gives a copy of the evaluation summary report, including the documentation of eligibility, to the student's parents. For information on general functionality, navigation, and additional plan and evaluation features, see the core [Plan and Evaluation Information](#) article.

The current format of this document is the **BIE Evaluation 2023**. Evaluation formats are selected in the [Eval Types](#) tool.

Editor Home - BIE Evaluation Summary Report <span></span>			
NAME	STATUS	MODIFIED BY	COMPLETED BY
Evaluation Header	IN PROGRESS	System Administrator 7/17/23 9:35 AM	>
Enrollment Information	IN PROGRESS	System Administrator 7/17/23 12:27 PM	>
Student Information	IN PROGRESS	System Administrator 7/17/23 9:35 AM	>
Parent/Guardian Information	IN PROGRESS	System Administrator 7/17/23 12:33 PM	>
Reasons for Referral	NOT STARTED		>
Intellectual Skills	NOT STARTED		>
Academic Achievement	NOT STARTED		>

Editor Home

## Evaluation Header

The Evaluation Header editor lists general information about the Evaluation.

Evaluation Header
IN PROGRESS

Editor 1 of 19

Evaluation Due Date  
03/13/2023

Evaluation Type  
Initial

Consent Date \*  
01/09/2023

Date Consent Received by School \*  
01/12/2023

Date Evaluation Completed \*  
01/18/2023

Reason 60 day timeline not met

Evaluation Header Editor

► [Click here to expand...](#)

Field	Description	Validation
<b>Evaluation Due Date</b>	A day 60 days from the date consent to evaluate the student for special education services is received.	This field auto-populates to a date 60 days from the date entered in the Date Consent Received by School field. This field is read-only.
<b>Date Evaluation Completed</b> <i>Required</i>	The day the evaluation is completed.	N/A
<b>Evaluation Type</b>	The type of evaluation. Options include: <ul style="list-style-type: none"> <li>Initial</li> <li>Reevaluation</li> </ul>	N/A
<b>Consent Date</b> <i>Required</i>	The day the consent is sent to the student's parent/guardian.	N/A
<b>Date Consent Received by School</b> <i>Required</i>	The day the school received consent from the student's parent/guardian to evaluate the student for special education services.	The date entered in this field automatically calculates to a date 60 days in the future. When a date is entered here, the Evaluation Due Date auto-populates.
<b>Date Evaluation Completed</b> <i>Required</i>	The day the evaluation was completed for the student.	N/A

Field	Description	Validation
<b>Reason 60 day timeline not met</b>	<p>The explanation for why the evaluation was not completed within the 60 day timeline. Options include:</p> <ul style="list-style-type: none"> <li>• Parent repeatedly fails or refuses to make child available for evaluation</li> <li>• Child transfers to new school after previous school has begun and evaluation is not completed (child no longer under the jurisdiction of the school)</li> <li>• Contract not awarded</li> <li>• Inclement weather</li> <li>• Evaluator not available</li> <li>• Other</li> </ul>	This field does not print.

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## Enrollment Information

The Enrollment Information editor reports Special Education information from the student's Enrollment.

The **Refresh** button retrieves a fresh copy of data from the student's record.

Enrollment Information
IN PROGRESS

Editor 2 of 19

Click Refresh to retrieve a new copy of data from a selected Enrollment record.

School

High School

Grade

11

District Information

District Number

District Name

Public School

District Address

MT 59540

District Phone

District SPED Address

MT 59540

District SPED Phone

► [Click here to expand...](#)

Field	Description	Location (when Refresh is clicked)
<b>School</b>	The name of the school associated with the student's Enrollment record.	Student Information > General > Enrollments > School
<b>Grade</b>	The student's current grade.	Student Information > General > Enrollments > Grade  Enrollment.grade
<b>District Information</b>		
<b>District Number</b>	The district number associated with the Enrolled school.	System Administration > Resources > District Information > State District Number
<b>District Name</b>	The district name associated with the Enrolled school.	System Administration > Resources > District Information > Name
<b>District Address</b>	The district address associated with the Enrolled school.	System Administration > Resources > District Information > Address
<b>District Phone</b>	The district phone number associated with the Enrolled school.	System Administration > Resources > District Information > Phone
<b>District SPED Address</b>	The district special education address associated with the Enrolled school.	System Administration > Resources > District Information > SPED Address
<b>District SPED Phone</b>	The district special education phone number associated with the Enrolled school.	System Administration > Resources > District Information > SPED Phone

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## Student Information

The Student Information editor displays basic information about the student such as demographic information. This is a read-only editor.

The **Refresh** button retrieves a fresh copy of data from the student's record.

Student Information

IN PROGRESS

Editor 3 of 19

When an Evaluation is generated, a snapshot of the student's information is taken from Census. Click Refresh to retrieve a new copy of data.

Last Name	First Name	Middle Name	Suffix
	Carter	Joe	
Race/Ethnicity	Birthdate	Age	
05: White, Non-Hispanic			
Address			
Primary Language		NASIS ID	
Case Manager Information			
Name		Title	
Phone			

Student Information Editor

► [Click here to expand...](#)

Field	Description	Location (when Refresh is clicked)
<b>Last Name</b>	The student's last name.	Census > People > Demographics > Last Name  identity.lastName
<b>First Name</b>	The student's first name.	Census > People > Demographics > First Name  identity.firstName
<b>Middle Name</b>	The student's middle name.	Census > People > Demographics > Middle Name  identity.middleName
<b>Suffix</b>	The student's suffix.	Census > People > Demographics > Suffix Name  identity.suffix
<b>Race/Ethnicity</b>	The student's state defined race.	Census > People > Demographics > State Race/Ethnicity
<b>Birthdate</b>	The student's birthdate.	Census > People > Demographics > Birth Date  identity.birthDate
<b>Age</b>	The student's age.	Census > Person Information > Age

Field	Description	Location (when Refresh is clicked)
<b>Address</b>	The student's address.  This field becomes a dropdown when more than one address exists for the student. The primary household displays by default.	Census > Households > Address Info  address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip
<b>Primary Language</b>	The student's first language.	Census > People > Demographics > Home Primary Language  identity.homePrimaryLanguage
<b>NASIS ID</b>	The student's state ID number.	Census > People > Demographics > NASIS ID
<b>Case Manager Information</b>		
<b>Name</b>	The first and last name of the team member.	Student Information > Special Ed > General > Team Members
<b>Title</b>	The role of the team member.	Student Information > Special Ed > General > Team Members
<b>Phone</b>	The phone number of the team member.	Student Information > Special Ed > General > Team Members

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## Parent/Guardian Information

The Parent/Guardian Information editor populates based on the guardian checkbox on the student's [Relationships](#) tool. The editor includes [Demographics](#) information for the student's guardian.

The **Delete** button next to each parent/guardian can be used to remove a parent/guardian from the IEP.

The **Refresh** button retrieves a new copy of parent/guardians' data. This also returns any accidentally deleted people. Manually entered fields do not change when the refresh button is clicked. The user must **Save** after clicking Refresh to capture changes.

Parent/Guardian Information
IN PROGRESS
Editor 4 of 19

When an Evaluation is generated, a snapshot of the parent/guardian information is taken from Census. Individuals with the Guardian checkbox marked on the Relationship tool for the student display below. Click Refresh to retrieve a new copy of data.

Brian - Parent

Print Sequence

1

Delete

Address

MT 59540

Home Phone

Work Phone

Cell Phone

E-mail

Elizabeth - Parent

Print Sequence

2

Delete

Parent/Guardian Information Editor

► [Click here to expand...](#)

Field	Description	Validation
<b>Last Name</b>	The last name of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
<b>First Name</b>	The first name of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
<b>Middle Name</b>	The middle name of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
<b>Suffix</b>	The suffix of the parent/guardian.	This field populates from Census. This is part of the header for the parent/guardian.
<b>Relationship</b>	The relation of the parent/guardian to the student.	This field populates from Census. This is part of the header for the parent/guardian.
<b>Print Sequence</b>	The print order of the parent/guardian(s) on the IEP.	When no Sequence is selected, parent/guardian(s) print in the order displayed in the UI. When any Sequences are selected, parent/guardian(s) with a sequence number prints in the order defined. Unordered parent/guardians display below the sequenced records.

Field	Description	Validation
<b>Address</b>	The parent/guardians' address.	This field populates from Census > Household > Addresses.  When there are multiple addresses for a person, the drop down with an option to select which address displays. When there is only one address, the drop down only has one option. The populated address is the one marked Primary.
<b>Home Phone</b>	The home phone number of the parent/guardian.	This field populates from Census > Personal Contact Information > Household Phone.
<b>Work Phone</b>	The work phone of the parent/guardian.	This field populates from Census > People > Demographics > Work Phone.
<b>Cell Phone</b>	The cell phone of the parent/guardian.	This field populates from Census > Personal Contact Information > Cell Phone.
<b>Email</b>	The primary email address for the parent/guardian.	This field populates from Census > Personal Contact Information > Email.

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## Reasons for Referral

The Reasons for Referral editor is used to document the reasons the parent/guardian(s) and/or school personnel referred the student for an evaluation.

Reasons for Referral

NOT STARTED

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Parent Information

Reasons for Referral, Parents, School Personnel

*Reasons for Referral Editor*

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## Intellectual Skills

The Intellectual Skills editor is used to document the student's current level of intellectual development.



Intellectual Skills
NOT STARTED
Editor 6 of 19

Current Intellectual Assessment Results

Intellectual Information

*Intellectual Skills Editor*

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## Academic Achievement

The Academic Achievement editor is used to document the student's current level of academic achievement in the classroom.

Academic Achievement
NOT STARTED
Editor 7 of 19

Current Academic Achievement Assessment Results

Academic Information

*Academic Achievement Editor*

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## Communication Skills

The Communication Skills editor is used to document the student's current level of communication skills.

Communication Skills
NOT STARTED
Editor 8 of 19

Current Communication Skills Assessment Results

Communication Information

*Communication Skills Editor*

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## Physical/Medical

The Physical/Medical editor is used to document the student's physical and medical health.

Physical/Medical
NOT STARTED
Editor 9 of 19

Current Physical/Medical Assessment Results

Physical/Medical Information

Physical/Medical Editor

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## Motor Skills

The Motor Skills editor is used to document the student's current level of movement and motor ability.

Motor Skills
NOT STARTED
Editor 10 of 19

Current Gross and/or Fine Motor Skills Assessment Results

Gross and/or Fine Motor Skills

Motor Skills Editor

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## Social, Emotional and Behavioral

The Social, Emotional and Behavioral Skills editor is used to document the student's current level of emotional and behavioral abilities.

Social, Emotional and Behavioral
NOT STARTED
Editor 11 of 19

Current Social, Emotional and Behavioral Assessment Results

Social, Emotional and Behavioral Information

Social, Emotional and Behavioral Editor

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## Adaptive Skills

The Adaptive Skills editor is used to document the student's current level of adaptive skills.

Adaptive Skills
NOT STARTED

Editor 12 of 19

Current Adaptive Skills Assessment Results

Adaptive Skills

Adaptive Skills Editor

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## Hearing

The Hearing editor is used to document the student's hearing abilities.

Hearing
NOT STARTED

Editor 13 of 19

Current Hearing Assessment Results

Hearing

Hearing Editor

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## Vision

The Vision editor is used to document the student's visual abilities.

Vision
NOT STARTED

Editor 14 of 19

Current Vision Assessment Results

Vision

Vision Editor

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## Vocational

The Vocational editor is used to document the student's vocational skills.

Vocational
NOT STARTED

Editor 15 of 19

Current Vocational Assessment Results

Vocational

Vocational Editor

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## Developmental Delay

The Developmental Delay editor is used to document any delays to the student's development.

Developmental Delay
NOT STARTED

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Current Developmental Delay Assessment Results

Developmental Delay

Developmental Delay Editor

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## Classroom Observations

The Classroom Observations editor is used to describe the student's performance in the classroom.

Classroom Observations
NOT STARTED

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Classroom Observations

Classroom Observations Editor

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## Other

The Other editor is used to document any additional information pertinent to the evaluation of the student for a determination of eligibility.

Other

NOT STARTED

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Other

Other Editor

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## Determination of Eligibility

The Determination of Eligibility editor is used to document the team's decision regarding the action needed for the student based on all the data collected in the previous editors.

Determination of Eligibility

IN PROGRESS

Editor 19 of 19

The evaluation team has reviewed the evaluation data and proposed the following action:

**Eligibility Determination \***

☒ This child has a disability, as defined in the Individuals with Disabilities Education Act (IDEA 2004), in the area of (Visual Impairments). This disability adversely affects educational performance, and the child requires specialized instruction. The team agrees that neither lack of instruction in reading or math, nor limited English proficiency was a factor in this determination.

☐ This child does not have a disability, as defined in the Individuals with Disabilities Education Act (IDEA 2004), that adversely affects educational performance, and does not require specialized instruction.

**Related Services are required for this child.**

No

If yes, list service(s):

Does this child need further evaluation to determine special education services?  
If yes, refer to the child's Assessment Plan.

Determination of Eligibility Editor

► [Click here to expand...](#)

Field	Description	Validation
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Field	Description	Validation
<b>Eligibility Determination</b> <i>Required</i>	<p>The determination of the team. Options include:</p> <ul style="list-style-type: none"> <li>This child has a disability, as defined in the Individuals with Disabilities Education Act (IDEA 2004), in the area of (select Primary Disability below). This disability adversely affects educational performance, and the child requires specialized instruction. The team agrees that neither lack of instruction in reading or math, nor limited English proficiency was a factor in this determination.</li> <li>This child does not have a disability, as defined in the Individuals with Disabilities Education Act (IDEA 2004), that adversely affects educational performance, and does not require specialized instruction.</li> </ul>	<p>Only one option can be selected.</p> <p>When a user selects a primary disability, the disability populates to (Select Primary Disability Below).</p>
<b>Related Services are required for this child.</b>	<p>Indicates the student requires related services. Options are Yes or No.</p>	<p>N/A</p>
<b>If yes, list service(s)</b> <i>*Required</i>	<p>A description of the services required.</p>	<p>*This field is available and required when Yes is selected for "Related Services are required for this child."</p>
<b>Does this child need further evaluation to determine special education services?</b> <i>*Required</i>	<p>Options are Yes or No.</p>	<p>*This field is available when No is selected for the Eligibility Determination question.</p>

Field	Description	Validation
<b>Primary Disability</b> <i>*Required</i>	<p>The student's primary disability. Options include:</p> <ul style="list-style-type: none"> <li>• Intellectual Disabilities</li> <li>• Hearing Impairments/Deafness</li> <li>• Speech or Language Impairments</li> <li>• Visual Impairments</li> <li>• Emotional Disturbance</li> <li>• Orthopedic Impairments</li> <li>• Other Health Impairments</li> <li>• Specific Learning Disabilities</li> <li>• Deaf/Blindness</li> <li>• Multiple Disabilities</li> <li>• Autism</li> <li>• Traumatic Brain Injury</li> <li>• Developmental Delay</li> </ul>	<p>*This field is required when users selects the check box for "This child has a disability..." and is unavailable when "This child does not have a disability..." is selected.</p>
<b>Determination of Eligibility Date</b> <i>Required</i>	<p>The day the team made the eligibility determination decision.</p>	<p>This field always displays on print.</p> <p><b>Ad hoc inquiries:</b> evaluation.determinationDate</p>

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## Previous Versions

[Evaluation Summary Report \(BIE\) \[.2327 and previous\]](#)